

Special Report

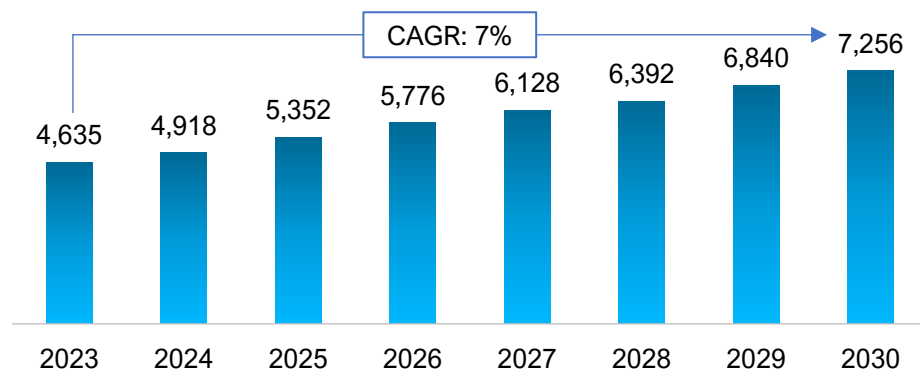
# The Rise in Global Health and Wellness Investments

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## Global health & wellness market set to reach USD 7.3trillion by 2030 as holistic well-being becomes mainstream

### Global Health & Wellness Market (USD Bn)



- The market includes personal care products, fitness equipment, wellness tourism, nutrition services, fitness programs, and preventive healthcare.
- The market is projected to grow from USD 4,635 billion in 2023 to USD 7,256bn by 2030, at a CAGR of 7%.
- Wearable fitness devices and trackers are playing a significant role in market expansion.
- Wellness tourism, including mineral spas, is emerging as a strong growth driver.
- There is rising demand for sustainable, organic, and eco-friendly health and wellness products.
- Beauty and personal care products hold the largest market share at 35.2%.
- North America leads the market with a 39.5% share, while Asia-Pacific is expected to experience substantial growth.

### Reason for Growth in Health & Wellness Market:

#### Rising Consumer Spend on Wellness and Health Products

Consumers are increasingly prioritizing their health, leading to higher discretionary spending on supplements, fitness tools, personal care, and preventive health solutions. The trend reflects a shift from reactive to proactive healthcare consumption.

#### Increasing Incidence of Physical Health Issues

Chronic conditions such as obesity, diabetes, hypertension, and cardiovascular diseases are driving demand for solutions that promote better physical health, including nutrition-based interventions and fitness programs.

#### Growing Awareness of Mental Health

Mental health is no longer a fringe concern – it has become central to wellness discussions. The demand for stress management tools, therapy apps, and corporate wellness programs is rising sharply, especially post-pandemic.

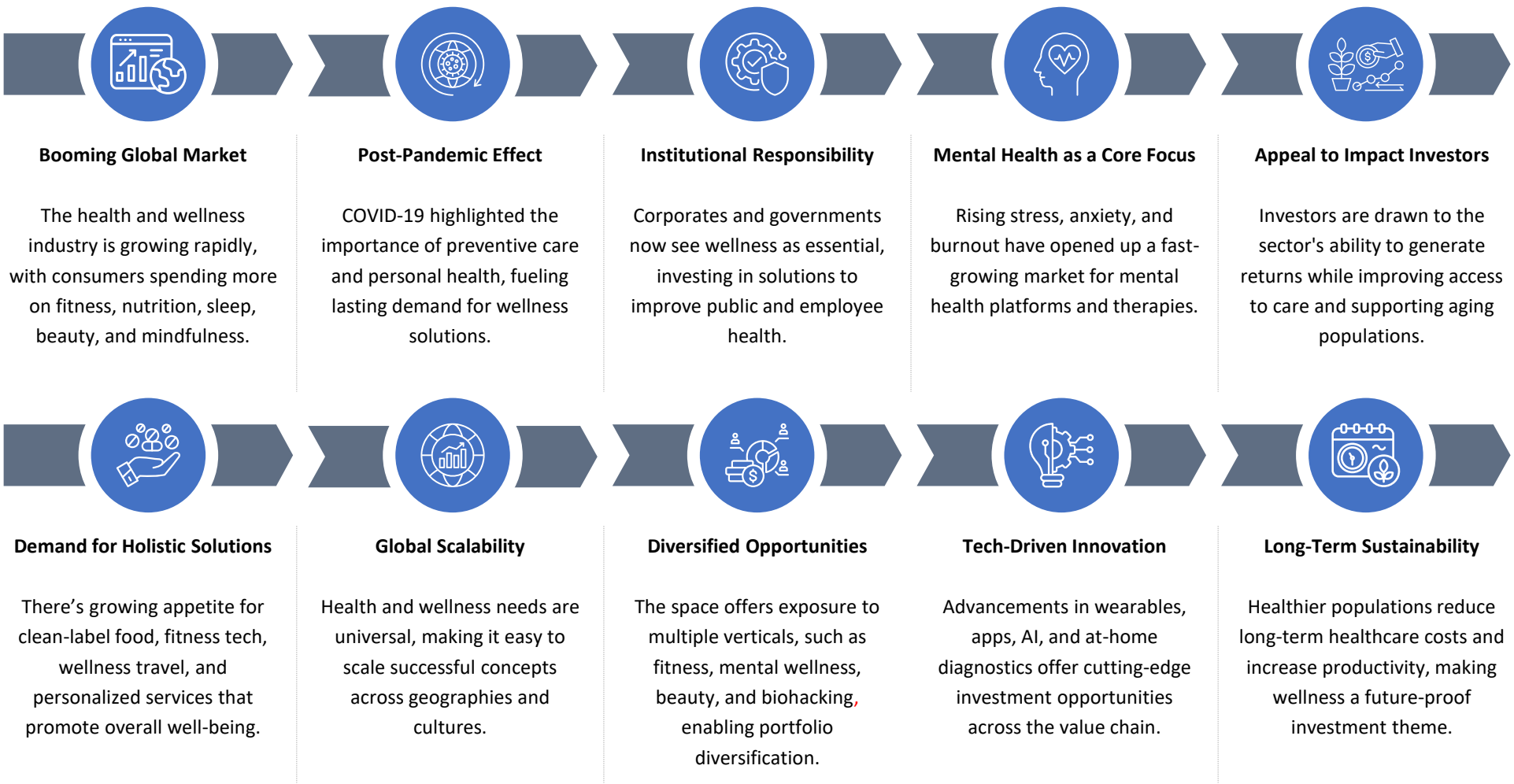
#### Focus on Holistic and Preventive Wellness

Consumers are shifting toward holistic approaches that integrate physical, emotional, and mental well-being. Personalized nutrition, alternative medicine, and lifestyle-based preventive care are gaining mainstream traction.

Source: Market.US

Heightened post-pandemic awareness, recurring revenue models, strong brand loyalty, and scalable operations, and institutional prioritization fuel sustained investor interest

Reasons for the Rise in Investments in the Health & Wellness Market



## Investment trends: VCs pour capital into digital health, longevity, and personalized wellness as tech meets health & PE firms target high-growth wellness categories like supplements, boutique fitness, and consumer health platforms

### Venture Capital (VC) Trends

Venture capitalists are focusing on innovation-driven, early-to-growth-stage startups that are leveraging technology, personalization, and data to disrupt traditional healthcare and wellness models.

#### Digital Health Platforms

Platforms offering remote consultations, chronic care management, diagnostics, and personalized healthcare solutions are seeing strong VC interest.

#### Fitness Tech & Wearables

Startups developing smart wearables, real-time biometrics, and fitness ecosystems (hardware + software) are gaining traction.

#### Mental Health & Teletherapy Startups

With mental health destigmatized post-pandemic, digital therapy platforms are booming. Focus areas: therapy apps, meditation apps.

#### Longevity & Personalized Nutrition

Early-stage investment in companies targeting biological aging, DNA-based diets, microbiome testing, and supplement regimens.

### Private Equity (PE) Trends

PE investors are targeting scalable, cash-generating companies with established customer bases and strong margins. Focus is often on roll-ups, branding, and operational scale-up.

#### Nutraceuticals & Supplement Brands

Consumer-driven demand for clean-label, organic, and functional supplements is attracting PE interest. Buyouts and growth capital going into brands with strong direct to consumer or retail presence.

#### Boutique Fitness Chains & Studios

PE firms are backing boutique models offering unique experiences (e.g. yoga, Pilates, recovery), with potential for franchising or studio roll-ups.

#### Consumer Health & Wellness Platforms

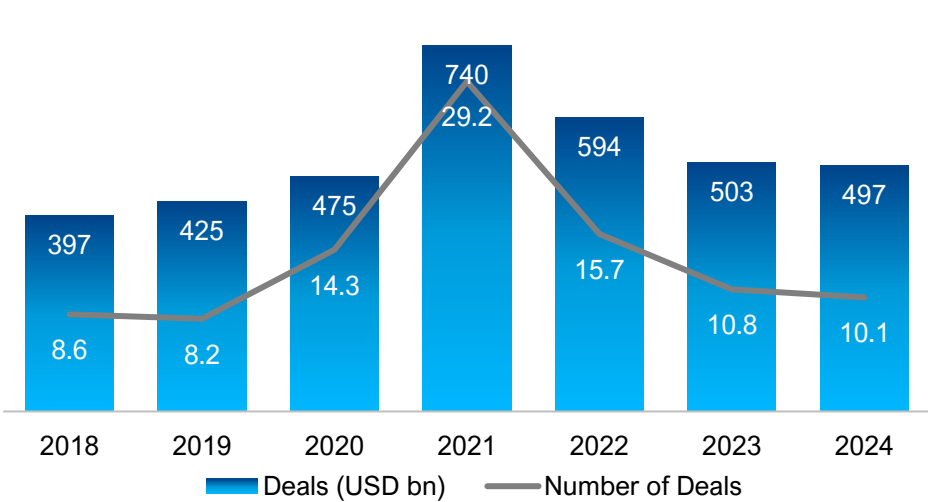
Platforms aggregating diagnostics, coaching, e-commerce, and subscription-based models. High-margin recurring revenue and consumer stickiness are key pull factors.

#### Wellness Services & Infrastructure

PE firms are increasingly investing in physical infrastructure and service networks such as wellness clinics, recovery centers, med-spas, and IV therapy lounges.

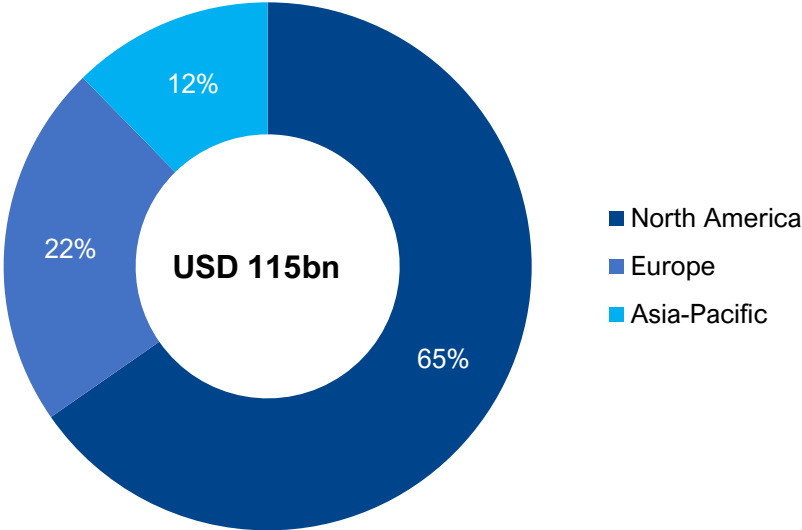
Digital health deal flow has reset but sustains above pre-2019 levels, reflecting persistent long-term demand

Deals in the US in Health & Wellness Space



- Global deal activity in Health & Wellness peaked in 2021 (USD 29.2bn, 740 deals), driven by pandemic tailwinds. Since then, volumes have normalized but remain resilient, with 2024 recording USD 10.1bn across 497 deals - well above pre-2019 benchmarks.”
- Investor focus shifted to early-stage deals, with 63% of rounds labeled, 86% of those targeting Seed to Series B - highlighting heightened interest in promising, less-mature startups.
- A coexistence of players is expected in 2025, where both nimble early-stage startups (Davids) and well-resourced giants (Goliaths) drive sector evolution - provided smaller players maintain strategic focus.

Global Healthcare Private Equity Deal Value Split by Region








Notable Investors and Acquirers in the Space



Outlook

Going forward the pipeline is expected to be driven by digital health roll-ups, aging population-focused platforms, and beauty/aesthetics consolidations.

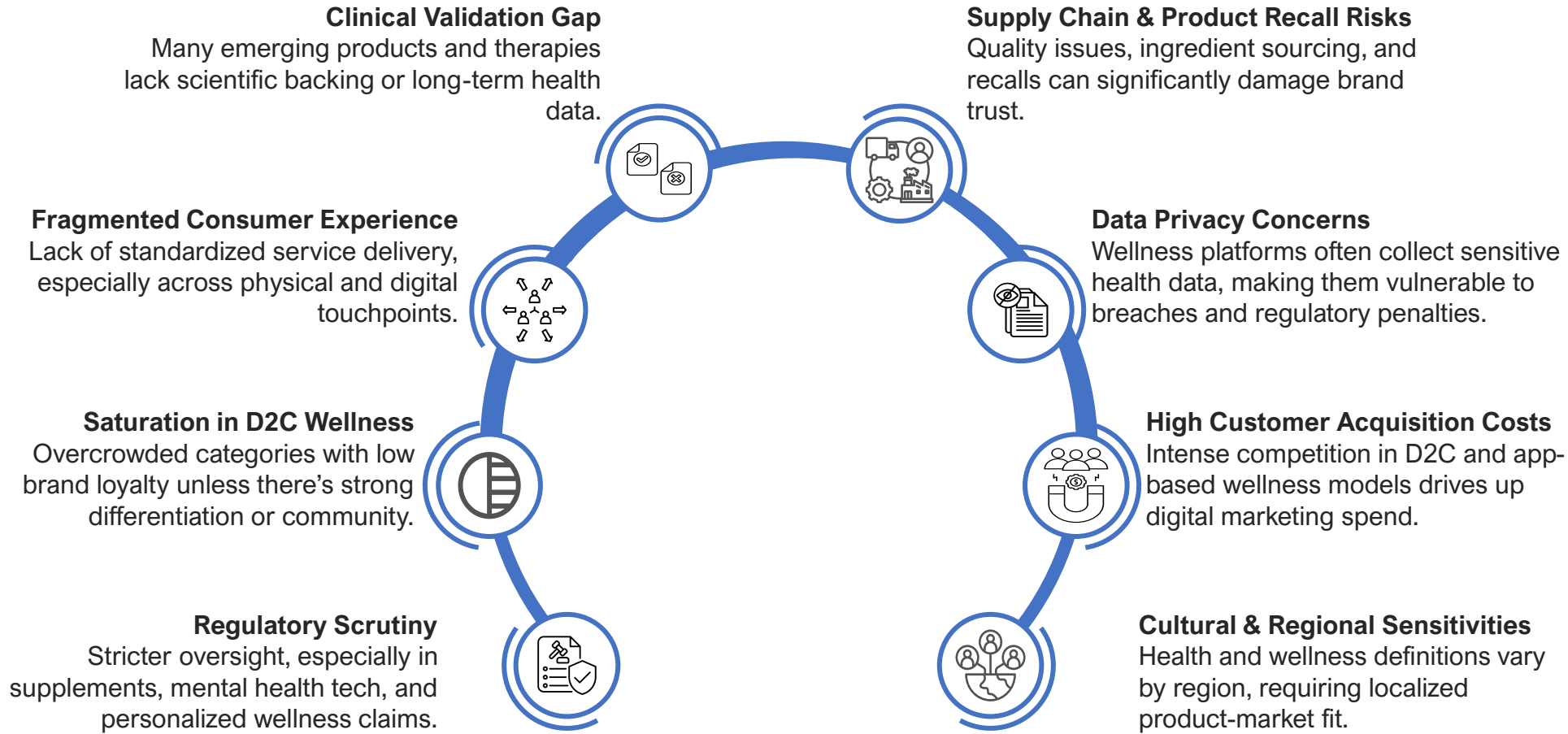
## Subsector dynamics: Key growth drivers in Global Health & Wellness

	What it Consists	Growth Drivers
 <b>Nutrition &amp; Supplements</b>	Functional foods, vitamins, sports nutrition, personalized supplements	<ul style="list-style-type: none"> <li>▪ Shift toward preventive healthcare &amp; longevity</li> <li>▪ Younger consumers demanding “clean label” &amp; plant-based</li> <li>▪ Personalized nutrition (DNA/biomarker-based) scaling</li> <li>▪ E-commerce direct-to-consumer fueling growth</li> </ul>
 <b>Fitness &amp; Wearables</b>	Gyms, boutique fitness, connected fitness apps, wearables	<ul style="list-style-type: none"> <li>▪ Growth in at-home fitness post-pandemic</li> <li>▪ Consumer demand for self-tracking &amp; health data ownership</li> <li>▪ Integration with insurance &amp; corporate wellness programs</li> <li>▪ Continuous innovation (rings, smartwatches, AI-driven analytics)</li> </ul>
 <b>Personal Care &amp; Beauty</b>	Aesthetics, skincare, cosmeceuticals, med-spas, beauty-tech	<ul style="list-style-type: none"> <li>▪ Strong consumer shift to “look good, feel good” lifestyle</li> <li>▪ Growth in non-invasive, tech-driven aesthetics (Botox, fillers, devices)</li> <li>▪ Digital-native brands winning with D2C strategies</li> <li>▪ Male grooming &amp; Gen Z demand expanding the total addressable market</li> </ul>
 <b>Wellness Tourism &amp; Retreats</b>	Wellness resorts, medical spas, luxury retreats, integrative resorts	<ul style="list-style-type: none"> <li>▪ Rising demand for stress management &amp; burnout recovery</li> <li>▪ Post-pandemic “revenge travel” fueling premium wellness trips.</li> <li>▪ Medical tourism blending with wellness (longevity clinics, detox)</li> <li>▪ Affluent millennials &amp; Gen Zs prioritizing “experiences” over products</li> </ul>
 <b>Mental Wellness</b>	Mindfulness apps, teletherapy, workplace stress solutions, coaching	<ul style="list-style-type: none"> <li>▪ Rising awareness, reduced stigma making mental wellness mainstream</li> <li>▪ Digital therapy, meditation, AI platforms expanding access at scale</li> <li>▪ Corporates, insurers embedding mental health into benefits coverage</li> <li>▪ Gen Z, Millennials fueling demand with openness to support</li> </ul>



Saturation, regulation, and trust issues pose key risks in a fragmented wellness landscape

Challenges & Investor Watchouts



Health & wellness is no longer niche - it's a durable, global investment theme with lasting momentum

## Conclusion & Outlook



### Not Just a Trend, but a Structural Shift

The wellness industry has evolved from a niche lifestyle segment to a core focus of global consumer behavior and institutional capital.



### Post-Pandemic Momentum Stays

COVID-19 catalyzed lasting awareness around physical and mental health, which continues to shape demand and innovation.



### Tech & Personalization Define Future

Wearables, telehealth, AI-driven nutrition, and personalized care solutions are rapidly reshaping how consumers actively engage with wellness.



### Diverse Investment Across Asset Classes

From early-stage digital health startups to mature supplement brands and boutique fitness chains, the sector offers something for every investor profile.



### Social Impact & Financial Returns

The wellness sector uniquely aligns investor objectives of strong return, scalable growth, and meaningful impact on global well-being.



### Innovation Driving New Frontiers

Advances in diagnostics, AI-driven health tracking, and digital platforms are reshaping how consumers access and engage with wellness.

## 10-Year Outlook

Expect continued VC and PE activity, increased M&A, and growing interest from strategic players, insurers, and governments.





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